

# LOUISIANA TRANSIT MARKETING WORKBOOK

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Tools for Building  
Customized Marketing Plans  
for Louisiana Transit Operators

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***TRANSIT***

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November 2002

## Acknowledgements

The greatest strength of the rural transit agencies operating in Louisiana is their history of dedicated service to their clients. In spite of the fact that these agencies operate on limited budgets and their equipment is sometimes old and unreliable they always manage to provide service to their clients, sometimes even using their personal vehicles.”<sup>1</sup>

This workbook is dedicated to those agencies currently operating in the Louisiana Transit network to serve citizens in our rural communities. It is our hope that its contents will benefit these agencies as they build their local service and the Louisiana Transit network presence to better serve their clients.

A special THANK YOU to those agencies that responded to our request for feedback on the usefulness of the 1998 edition of the Louisiana Transit Marketing Workbook. Your comments were very helpful to us in developing this revised edition.

***TOGETHER, WE’LL GET THERE ...***



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<sup>1</sup> Louisiana Transit, Louisiana Transit Marketing Workbook, Advertising and Marketing for Louisiana Transit Operators, April 1998, p. 4

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# 1. Introduction



Public transit agencies are becoming more and more like their private counterparts, with good reason. Agencies are being asked to provide more services with fewer resources, respond proactively to public scrutiny, and maintain their market share in the face of direct competition for riders from the private sector. These factors are forcing public transit agencies to use commercial marketing strategies and techniques to ensure their continued viability and to grow with the needs of their communities. In a presentation to other transit marketing professionals, one highly successful transit system's Director of Marketing encouraged her peers to

“Stand up right now and shake off all of that public sector attitude – you are no different than any other private sector service – be creative and positive and sell yourselves.”<sup>1</sup>

In 1998, the Louisiana Department of Transportation and Development (DOTD) first published the Louisiana Transit Marketing Workbook. The Workbook's main objective was to enable Louisiana's network of Section 5311 agencies to effectively market themselves under the auspices of the Louisiana Transit system, and to promote public awareness of the Louisiana Transit system throughout the state. Agencies in the Louisiana Transit network must be especially creative in their marketing approach because of limited resources.

A survey conducted by Louisiana Transit in August 2002<sup>2</sup> indicates that more than half the agencies receiving the 1998 Workbook have put its contents to use. Most of the responding agencies indicated that they would welcome and likely use a fill-in-the-blank format for developing a customized marketing plan for their agency. The majority of responding agencies also requested more samples and templates for marketing ideas. This Workbook has been designed to meet those requests.

As with the original Louisiana Transit Marketing Workbook, the objectives of this revised edition are to:

- Develop and promote an image of Louisiana Transit as a statewide system of public and specialized transportation
- Increase user and non-user awareness of the multitude of benefits that public and specialized transit creates for the community

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<sup>1</sup> Transportation Research Board, Report 50, A Handbook of Proven Marketing Strategies for Public Transit. Washington, D.C.: National Academy Press, 1999, p. 1

<sup>2</sup> Approximately 70 percent of the agencies surveyed responded by completing a detailed questionnaire. Of those responding, 45 percent indicated they were not aware of the Workbook as a marketing tool. The remainder answered detailed questions about current use of the Workbook and revisions/additions that might prove useful to them.

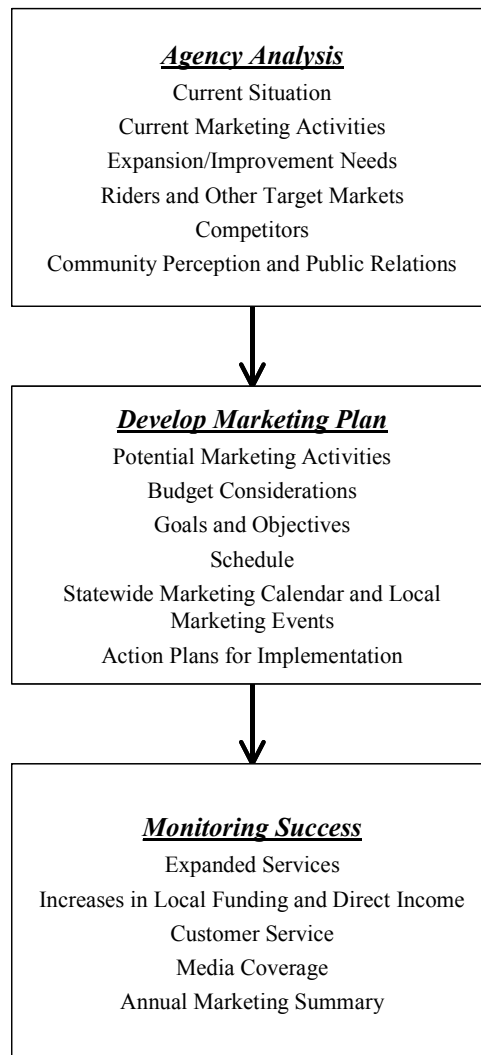
- Make Section 5311 agency vehicles more accessible to the rural public and easier to use
- Increase the use of Section 5311 vehicles
- Develop a strong statewide coalition of transit providers.

In addition to these objectives, the Governor's *Louisiana: Vision 2020* sets out a public transit objective of providing basic public transportation service in all areas of the state.

The organization of this workbook is in direct response to the expressed interest in a set of tools to develop individualized marketing plans based on local market environment. Each agency's customized plan will address all areas relevant to an integrated approach to marketing its services. Simple hands-on or interactive tools are provided in electronic format to accomplish the essential steps to developing an effective marketing plan. Following this Introduction, the workbook contains four additional sections:

- Section 2—***Objectives and Benefits of an Integrated Marketing Program***. This section discusses the importance of marketing to the agency. Marketing reaches beyond standard forms of advertising into every area of the agency's internal structures, presence in the community, networking capabilities, public recognition, and community support.
- Section 3—***Current Situation Analysis***. This Section sets the agency in motion, completing a series of simple fill-in-the-blank forms to gather and analyze all marketing related data. This background information is necessary to form goals and objectives for the agency, prioritize effective marketing tactics, and determine resources available for these high-priority marketing needs. Concurrently, the agency will be building a list of essential contacts that will serve as "partners" in promoting the agency's service to the community.
- Section 4—***Marketing Plan Development and Implementation***. Templates, tools and samples are provided to develop a marketing campaign based on the results of the work accomplished in the Current Situation Analysis. Again, forms, calendars, processes and templates are provided in electronic format to maximize the use of available resources and to maintain consistent formatting throughout the Louisiana Transit system. Many of the templates provided are interactive, allowing customization by each agency to fit its own marketing needs. Simple instructions for use are included in this document and in the directory labeled *Instructions CD*.
- Section 5—***Monitoring Success***. No marketing plan is complete without the means to measure its effectiveness. And, as part of a growing network of providers, successful marketing events for one agency may benefit the entire network. Each agency's marketing plan should be a living document, adjusted from time to time to meet changing needs and changing communities. Avenues and forms for gathering data are provided in this section, along with contact information to submit these data to the Louisiana Transit main offices.

The sections follow a natural flow, with the activities in each section forming the foundation for the next section, as shown in the flowchart below. The flowchart lists the exercises performed in Sections 3 through 5.

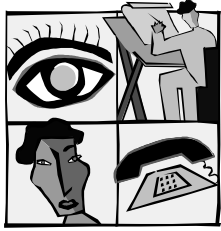


It is envisioned that each agency will complete the hands-on activities described in Sections 3 through 5, and modify them where appropriate. Completed forms, calendars, contacts lists, etc., can then be printed and placed in a Marketing Plan binder that is organized into the following sections for easy reference:

- Executive Summary
- Current Situation Analysis
- Marketing Calendar and Plan
- Results

The Executive Summary section is optional; it provides a simple summary of the agency's goals for marketing and would be useful if the agency decides to use the marketing plan as a tool to market to its community leaders and other service providers.

## 2. Objectives and Benefits of an Integrated Marketing Program



Marketing, simply put, is finding ways to exchange things of value between two groups. Marketing defines each group and the value it offers to the other, and then finds avenues to connect the groups so that the exchange may occur and mutually benefit both groups. These avenues must be affordable and must contain elements that can be measured to determine their effectiveness. Within the Louisiana

Transit network, each agency has transportation services available to people who need those services. When people use these services, Louisiana Transit agencies continue to receive funding through the Section 5311 program and local matching contributions. Passengers also pay for services with fares, generating direct income to support the agency's operations and growth.

Marketing requires a clear understanding of objectives and a solid, measurable plan of action. Specific marketing objectives for each agency will vary depending on the agency's circumstances; however, most agencies will find that many of their goals will fit into the following categories:

- Promote the Louisiana Transit system (positioning)
- Ensure customer satisfaction
- Increase local awareness and financial support
- Expand agency services
- Increase service income
- Increase agency and fleet stability

Each agency should review where it stands in these categories and determine measurable actions that will improve specific areas. Each of these categories has a strong potential to benefit the agency, the agency's ability to serve the community, and the agency's employee satisfaction.

Resources available will govern the marketing efforts for most rural agencies. With limited financial resources available, such marketing elements as customer satisfaction, public information, networking, partnering with local for-profit businesses, creative public awareness through the press, and daily visibility of the Louisiana Transit logo will generate the best rate of return of the available marketing choices. Other marketing elements (e.g., advertising, fliers, giveaways) are included for those agencies that have the internal resources or can encourage for-profit business partners to contribute to the cost. Finally, the best marketing plans are those that are developed by the team of people who will be responsible for carrying them out.



## ***2.1. Promote the Louisiana Transit System***

Actively participating in the Louisiana Transit system brings several benefits to the local agency:

- Recognition as part of a cohesive network of service providers who are professionally guided and have accountability to a statewide system
- Access to vehicles that are “branded” with the Louisiana Transit logo and therefore recognized as part of the Louisiana Transit system
- Participation in statewide events (and thereby “piggybacking” on marketing conducted throughout the state by sister Louisiana Transit agencies)
- Increased newsworthiness because of the “bigger picture” element of belonging to a statewide network and participating in statewide events.

These benefits should pave the way for customer recognition and desire to use the agency’s services, as well as encourage support for local funding.

## ***2.2. Ensure Customer Satisfaction***

The word “marketing” frequently conjures up the idea of ad slicks, radio announcements, billboards and similar advertising efforts. While these are effective tools for making the public aware of the services being offered, everyday marketing conducted by a company’s employees in the course of doing business is in fact more effective and a great deal less expensive. Happy customers not only use the service regularly, they also spread the word among their associates and the agencies they visit using Louisiana Transit. Employees who are proud of their organization, aware of all the agency’s services, and committed to service with a smile are the best advertisers. This positive and proactive attitude also leads employees into conversations with their clients that can produce valuable feedback for improvements or expansion of services.

## ***2.3. Increase Local Awareness and Financial Support***

Serving the community brings its own rewards, but rural transit agencies face obstacles in obtaining funding to maintain existing operations, let alone expand services and increase the agency’s customer base.

While FTA Section 5311 program funds provide resources for new vehicles and operations, this funding must be matched by local contributions. Increased community support for local Louisiana Transit services will move public officials, businessmen, and community leaders to find new avenues to obtain the local match. Increased local matched funding will provide much-needed resources for operation improvements and expansion.

## ***2.4. Expand Agency Services***

Most parishes participating in the Louisiana Transit program have a greater-than-average percentage of people living at or below the poverty line. These people – and those who are disadvantaged in other ways – need transportation services. Louisiana Transit agencies are in a better position than competitors to provide these services. Untapped avenues exist for growth, funding operations, and effectively communicating the Louisiana Transit message.

## ***2.5. Increase Service Income***

As the agency's ability to serve all the target rider markets in its community expands, the opportunity for bringing in income through fares also increases. A broader base of riders, gaining market share over competitors who may have profit-oriented pricing structures, and the ability to pool a greater number of riders into trips may all have a positive impact on cash flow into the agency.

## ***2.6. Increase Agency and Fleet Stability***

Effective marketing should result in a broader market of customers requiring a broader range of services. When an agency has only one or two significant customer bases, a negative impact in the customer base could have disastrous results for the agency. With a broader base of customers, such negative impacts can be more easily accommodated by the agency. This greater stability in customers and services allows agencies to plan and operate more efficiently, build in backup systems, and smooth finances to accommodate such essentials as routine vehicle maintenance and upgrades.

### 3. Current Situation Analysis



Before an agency can begin to develop an integrated marketing plan, its current situation and standing in the local community and within the Louisiana Transit network must be reviewed. The purpose of this section is to guide the agency through this analysis using a series of forms. Several forms have been provided for use in this process both in this chapter and on the Marketing Workbook CD (Forms CD directory). Agencies may enter information directly into the forms, or print copies of forms. When the analyses using these forms are complete, the results may be summarized on the form entitled Current Situation Summary.

Using the forms, each agency can examine the six essential elements that govern marketing issues, diagnose deficiencies (within the agency itself or in its marketing program), and are the building blocks for a marketing plan. These six essential elements are:

- Services offered
- Customers (all target audiences) and competition
- Revenue (direct income and public funding)
- Service routes (where services are provided)
- Ability to meet demands in a satisfactory way
- Promoting the agency

#### 3.1. Understanding the Organization

How well is the agency meeting its goals as a Section 5311 provider under the auspices of the Louisiana Transit network? How well is the agency maximizing its participation in the Louisiana Transit network? Is the agency providing all the services needed by its community under Section 5311? If not, why? Are these services publicized effectively? Is customer service friendly and able to solve issues? Are the agency's employees happy in their work and well informed about the agency's services and future goals? Is the local community supportive? Are local leaders supportive? How well does the agency do in convincing its community to generate matching contributions for operations and capital expenditures? These questions must be answered as a first step toward building an effective marketing plan.

The following forms have been designed to answer some of the basic questions. Each agency's marketing team will use these completed forms as background information to complete the exercises provided in Section 4, *Developing a Marketing Plan*.

**Table 3-1**  
**Agency Analysis - General**

Use the right column of this form to document basic information about your agency and services relevant to the categories provided in the left column.

Services Provided	___ Demand response, scheduled _____ days in advance ___ Regularly scheduled routes ___ Other (describe _____)	
Typical Riders	% of Total	Description / Type
		Elderly
		Physically Handicapped
		Low Income
		Other (describe)
Equipment Description		
Area Served / Available Routes		
Approximate No. of Passengers/Month		
Goals for Expansion (number of vehicles, new targets, new routes)		
Number of Employees		
Employee Turnover (if "frequent", use this column to discuss reasons)	___ Rare ___ Occasional ___ Frequent	

**Table 3-1**  
**Agency Analysis - General**

Employee Training: Y / N - Handbooks or policies/procedures available? Y / N – Training is regularly scheduled?	<input type="checkbox"/> Customer Service <input type="checkbox"/> Public Information (services) <input type="checkbox"/> Safety <input type="checkbox"/> Other:
Sources of Training	<input type="checkbox"/> DOTD <input type="checkbox"/> Other:
Has an agency mission statement been developed? If so, is it still relevant? Provide the statement here.	
Public Information (how easy is it for your public to find you?)	<input type="checkbox"/> Published Guides <input type="checkbox"/> Maps <input type="checkbox"/> Telephone directory(s) – List  <input type="checkbox"/> Website with information <input type="checkbox"/> Other – List
<b>Customer Service</b>	
Hours available	
Who provides customer service, and is this a dedicated position (no other duties)?	
What are the typical requests fielded by customer services?	
Are many complaints/concerns received?	
Describe how complaints are resolved.	

**Table 3-1**  
**Agency Analysis - General**

How long does complaint resolution take?	
<b>Revenues</b>	
Have Section 5311 funds (federal and local matching) increased or decreased over the past year?	
Have direct fares increased or decreased over the past year?	

**Table 3-2**  
**Agency Analysis – Current Marketing**

Use the right column in this form to briefly describe events or actions taken over the past year relevant to the categories provided in the left column.

Participation in statewide LA Transit Events	<p>Check all that apply:</p> <p><input type="checkbox"/> The Sweetheart Deal</p> <p><input type="checkbox"/> Try Transit Week</p> <p><input type="checkbox"/> Bring a Friend Free Day</p> <p><input type="checkbox"/> Driver Appreciation Week</p> <p><input type="checkbox"/> Extra Mile Awards</p> <p><input type="checkbox"/> Open House</p> <p>Describe whether these activities were successful and any possible improvements to ensure success for future events:</p>
Local Events (festivals, church events, fairs, etc.)	
Customer and vendor survey cards (“How Are We Doing?”)	
Public Relations (effective use of press and other media – describe any press coverage achieved over the past year). If you have a website, is it linked through any “partner” websites?	
Networking with potential marketing partners, local business leaders / groups, and political leaders	
Visits to schools, hospitals, seniors communities, public housing complexes	
Advertising (all local print, radio, TV advertising, public service announcements, fliers, banners, etc.)	

<b>Table 3-2</b> <b>Agency Analysis – Current Marketing</b>	
Third party advertising partnerships (vendors placing placards, magnetic signs on Louisiana Transit vehicles)	
Giveaways/ Specials (list free fares, trinkets, etc. used for marketing)	
Direct Mail	
Other (please describe):	



<b>Table 3-3</b> <b>Agency Analysis – Expansion / Improvement Needs</b>	
Use the right column in this form to briefly discuss areas identified for possible expansion or improvement. Be sure to include any areas “discovered” during the completion of Tables 3-1 and 3-2, above	
Service Expansion (for example, more routes, greater access, more vehicles)	
Increase matching funding (to increase Section 5311 dollars available) or increase direct revenues	
Employees (better training, replace / expand staff)	
Customer Service	
Public Information (route guides, maps)	
Community Awareness (local support, business and political leader support)	
Public Relations (increase press coverage – free press is an excellent marketing tool, not only because of its low cost, but also because it provides a third-party endorsement)	
Partnering with local business and authorities to add to marketing resources available	
Increase participation in statewide Louisiana Transit Events and/or local events	
Other (describe)	

### **3.2. Understanding Customer Needs**

Each agency's target market will include the people currently served, as well as people who do not currently use the service for a variety of reasons, but who might ride if some modifications were made or if they knew more about the agency. Each type of customer will have unique needs. Beyond the actual services provided to current customers, the agency will want to ensure that riders know about all available services. Current riders may have additional needs themselves, and they are also very likely to come in contact with other potential customers for Louisiana Transit services. The agency should examine all the means of relaying this public information for ease of use and completeness. Customer and "partner" feedback forms should be accessible to all and their use encouraged (Figures 3-1 and 3-2, discussed later in this section). The benefits of both positive and negative feedback are enormous, from improving customer service to understanding the most likely-to-succeed avenues for expanding the agency's scope of services.

The following Rider Survey form should be completed for each potential category of rider, whether or not they are currently being served. Local rider categories, at a minimum, should include the elderly, persons with disabilities, low-income, and choice riders. Each agency's marketing team will use these completed forms as background information to complete the exercises provided in Section 4, *Developing a Marketing Plan*.

**Table 3-4**  
**Rider Survey**

Use the right column in this form to identify the needs and characteristics of existing and potential rider markets relevant to the categories provided in the left column. The Rider Survey form should be completed for each potential category of rider, whether or not they are currently being served.

Category of Rider (check one, and complete one table per category of rider)		Elderly
		Physically Handicapped
		Low Income
		Other (describe): _____
Services currently provided:	___ Demand-response, scheduled _____ days in advance ___ Regularly scheduled routes ___ Other (describe: _____ _____	
Services needed but not yet provided:		
Describe rates / fare schedule:		
% of <u>available</u> riders served (these are all people in the community who <u>might</u> avail themselves of the agency's services):		
Is public information (schedules, rates) available to all potential riders? In what formats (e.g., telephone, published guides, websites, fliers available at "partner" offices such as health care providers)? Is the public information easy to find?		
Improvements are needed in the following areas to provide better service or capture more riders in this category:		

**Table 3-4**  
**Rider Survey**

Which of the Louisiana Transit Annual Marketing Calendar events will appeal to this category of rider?	Check all that apply: <input type="checkbox"/> The Sweetheart Deal <input type="checkbox"/> Try Transit Week <input type="checkbox"/> Bring a Friend Free Day <input type="checkbox"/> Driver Appreciation Week <input type="checkbox"/> Extra Mile Awards <input type="checkbox"/> Open House
Special needs of this category of rider (for example special equipment or access)	
Marketing "Partners" who also have an interest in this category of rider (e.g., physical therapists for disabled persons)	
This category of rider provides potential for possible newspaper articles, special interest stories, etc. Some ideas are provided in the column to the right. Add to or change these to reflect the needs and interests of your community.	<input type="checkbox"/> Announce service route expansions <input type="checkbox"/> Announce increased accessibility (special equipment for special needs) <input type="checkbox"/> Special interest stories (local Louisiana Transit driver helps new mother) <input type="checkbox"/> Agency background information for article discussing special needs of certain citizens in the community <input type="checkbox"/> Other
Other:	

### **3.3. Other “Targets”**

Transit customers extend beyond riders and their families to people in the community who might recommend the agency’s service or who ensure receipt of local support and matching funds for capital projects or operations. These extended customers might include health and service workers, local and state government officials and legislators, business owners, and internal customers, such as the agency’s employees or the Louisiana DOTD.

Local health and service workers need route and schedule information at their fingertips so they can recommend Louisiana Transit’s services to their clients. It would also be helpful to develop some method of receiving information back from health and service providers regarding needs that may not be currently served, ways to improve the current system, customer complaints or praise, etc.

Local government officials and business people will need statistical information to justify funding for Louisiana Transit services and proposed expansions or improvement. They must also be regularly informed about community needs and concerns. The agency should make their support through increased funding and recommendations easy to justify. Support can be reciprocal when the Louisiana Transit agency becomes a partner of support to community leaders through its dedication to service, publicly available information, and benefits to the community at large.

**Table 3-5**  
**Other “Targets” Survey**

The purpose of this form is to identify each possible category of “extended customer” and examine the current effectiveness of networking and partnering with these targets. Think about each category of extended customer listed in the left column. First, list all names of people and companies who could benefit the agency next to the checkboxes in the right column. Then check the box if they are currently part of the agency’s networking/partnering circle for events and marketing activities. (Boxes may be checked by double-clicking on the box using the mouse and changing the status in the pull-down menu to “checked.”) Finally, describe current activities with checked “customers.”

Local and state government officials and legislators	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Current activities:
Business leaders (include Chamber of Commerce)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Current activities:
Health care providers	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>